

# IEOR PhD Reimbursement Guidelines



*i.e. "How to get your money back ASAP"*

## Travel Policies

Please review the travel policies carefully when submitting expenses for reimbursement. The IEOR page contains most of the relevant information needed for conference expenses. The Columbia page has the full policy text which includes more niche cases such as rental cars.

[IEOR Travel Policy](#) (Summary)

[University Travel Policy](#) (Full)



# Forms to Submit

## [Additional \\$500 Travel Grant](#)

Annual travel budget for our students is \$1000 / fiscal year. You can request up to an additional \$500 / fiscal year by completing the above form. Priority will be given to students presenting at conferences. Notes:

- Fiscal year dates are **July 1 - June 30**
- Unused funds **do not roll over**
- Speak with Winsor Yang if your conference expenses overlap with the fiscal year dates

## [NPP \(Non-Profiled Payee\) Form](#)

Overview of all expenses for a particular reimbursement. Needed to double-check details and maintain accurate records. Students are considered non-profiled payees because you don't have access to Concur (expense management platform).

1. Fill out the expense header with your name and event (e.g. *Winsor Yang - INFORMS 2023*.) You are the "payee".
2. Put each expense on a different line
3. Ignore the section titled "Expense Distribution"
4. Click "save and print" to generate a .pdf

✓ Save and Print

## Reimbursement Form

GoogleForm the IEOR Department uses to collect receipts and other needed information. It's a good idea to to check with Winsor Yang about your remaining travel budget before submitting. Now let's run through this section by section:

### Section 1

Funding Source(s) \*

- ☐ Department Travel Grant (\$1000/fiscal year)
- ☐ Faculty Grant / Project (please attach approval)
- ☐ Both (Combination of department and faculty funds)

Option 1 if the reimbursement will ONLY be from department funds

Option 2 if the reimbursement will ONLY be from a faculty grant

Option 3 for a combination (e.g. use up budget + advisor covers difference)

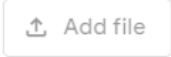
Total Amount \*


Your answer

Total reimbursement amount you are requesting

## Section 2 *(partially / fully covered by advisor)*

Faculty Approval \*

 Add file



Attach email approval (.pdf) from advisor confirming:

- that they will cover the expenses
- which project or grant to charge

**Note:** It is best practice to let your advisor know the estimated amount that would be charged to their account beforehand.

Faculty Project / Grant \*

Short answer text

For example: “Sethuraman - Discretionary” or “Lam - NSF Career”.

The project number or chartstring is helpful but not strictly necessary.

Amount covered by Faculty \*

Short answer text

Amount covered by Department \*


Short answer text


Usually based on your remaining travel budget for the year. You can check

Shi Yee Lee or Winsor Yang to see how much is left.

## Section 3 *(partially / fully covered by advisor)*


NPP (Non-Profited Payee) \*


 Add file

 View folder

Upload your [NPP form](#) here


Event Flyer


 Add file

 View folder

Needed to confirm event information (and that they match your expenses). Should include event name, location, dates, and additional information if possible.

Receipts (.zip / .rar / .7z) \*

 Add file

 View folder

Receipts need to be individually (and manually) added to a report in the expense management system. It saves a lot of time if you combine all receipts into an archive.

**Note:** The better organized your receipts, the quicker we can process your reimbursement. This means you get your money back sooner if your paperwork is cleaner! We will go into some guidelines below.

**Note:** Please make sure each file is **less than 5 MB!** That is the file size limit for Concur

# Receipt Guidelines

Receipts need to show proof of purchase or the entire expense report may be kicked back during the approval process. This means the following are not enough::

- ✗ Screenshot of one-off credit card charges or bank statements
- ✗ Non-itemized receipts with only a total amount
- ✗ Receipts that do not include the location / vendor

Examples of receipts that are sufficient::

- ✓ Picture or scan of an itemized paper receipt with date + proof of payment
- ✓ E-receipt or confirmation of purchase with date charged + proof of payment

**Note:** Please make a note directly on the receipt if the date you were charged is different from the date of the expense. Examples include booking a flight, booking a hotel room, or early-bird registration.

## Airfare

In most cases, flights need to be within 1-2 days of the event dates in order to be reimbursed. There are sometimes exceptions, but would require additional justification or else the expense report would be kicked back.

An example is if flights closer to the conference dates are significantly more expensive. In this case, please attach a screenshot (with date) showing that the alternative purchased ticket is cheaper than tickets that match the conference dates more closely.

Otherwise, just attach the e-ticket receipt. Remember this has to include the payment / charge (just the itinerary may not be enough).



## Lodging

Hotels need additional details when added to the expense report:

- Room rate needs to be itemized (e.g. \$80 / night)
- Taxes and fees (cleaning fees, service charge) can be nightly or lump for the entire reservation.

Please get an itemized receipt when you check out. If you are staying in an AirBnb, the purchase summary should be sufficient.

## Meals

The meal limits (\$25 breakfast / \$35 lunch / \$75 dinner) are pre-tax and pre-tip!

However, don't go crazy since your department budget is limited. You should have a good time connecting with peers and colleagues, but maxing out the budget here is not recommended, since excess costs usually come directly from advisors' funds... I guess

Alcohol can't be on a receipt by itself - there needs to be at least one food item. Please circle all alcoholic items on food receipts.

Snacks are unfortunately not covered 😞

## Split Costs

If you are eating or rooming with someone else and only covering part of the costs on the receipt:

- Make a note on the receipt (either directly on the paper or digitally) that this is a split cost.
- Include specific amount you covered and are requesting for reimbursement
- Include proof of payment that matches the above amount (separate receipt or labeled statement)
- Include confirmation (e.g. email record) of the split cost with other parties

## RAR / File Naming



Please use the following naming conventions when zipping the files:

### Archive

First\_Last\_UNI\_Event Name Year

*e.g. (Winsor\_Yang\_wy2396\_INFORMS 2023)*

### Receipt

# - Expense Type - Expense Date\*

*e.g. (1 - Airfare - 06.16.2023)*

*e.g. (2 - Uber - 06.17.2023)*

*e.g. (3 - Breakfast - 06.17.2023)*

*e.g. (4 - Lunch - 06.17.2023)*

*...etc.*

\* MM.DD.YYYY

### Notes

Please add notes to each receipt in case clarification is needed. Preferably this is done digitally for example in a .pdf editing software like Adobe.

## Questions?